



# Quick Reference Guide 4

## Outlook 2013 for Windows

### View Customizations



#### Outlook Pre-defined Views

Each folder has its own pre-defined view options. Below is a table of the views available for each folder type:

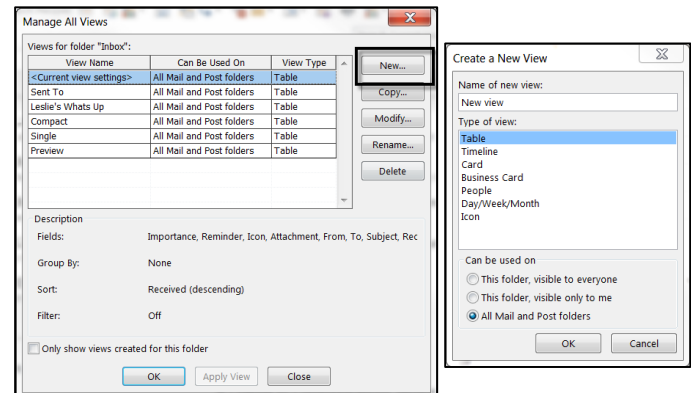
Folder	Views
Mail	Sent To, Compact, Single and Preview
Calendar	Calendar, Preview, List and Archive
Contacts	People, Business Card, Card, Phone and List
Tasks	Detailed, Simple List, To-Do List, Prioritized, Active, Completed, Today, Next 7 Days, Overdue and Assigned
Notes	Icon, List and Last 7 Days

#### Apply a Pre-defined View

1. Display the desired folder in the *Content Area* and click **View Tab | Change View**. A drop-down menu displays.
2. Select from the options for each folder type. See table above.

#### Create a New View

1. Display the folder for which you would like to create a new view. Click **View Tab | Change View**. A drop-down menu will display.
2. Click **Manage All Views**. The *Manage All Views* dialog box (shown near right) will display.
3. Click **New**. The *Create a New View* dialog box will display (shown far right).
4. Type a name for the view in the **Name of new view** field.
5. Click to select the **Type of view** from the list provided.
6. Select how the view can be used from the options **This folder, visible to everyone**, **This folder, visible only to me**, or **All Mail and Post folders**.
7. Click **OK**. The *Advanced View Settings* dialog box then displays to enable you to customize the view.



Follow the steps in the section *Customize a View* to select your new view settings.

#### Customize a View

As each folder has different view options (discussed above), the customizations that can be made to a **Calendar** view are different from those available for a **Mail** view. The following examples show the steps to customize a **Mail** View.

1. Click **View Tab | Change Views | Manage Views**. The *Manage All Views* dialog box will display (shown above).
2. In the **Views for folder** list, select the view to be edited and click **Modify**. The *Advanced View Settings* dialog box will display with buttons to modify **Columns**, **Group By**, **Sort**, **Filter**, **Other Settings**, **Conditional Formatting**, and options to **Format Columns**.

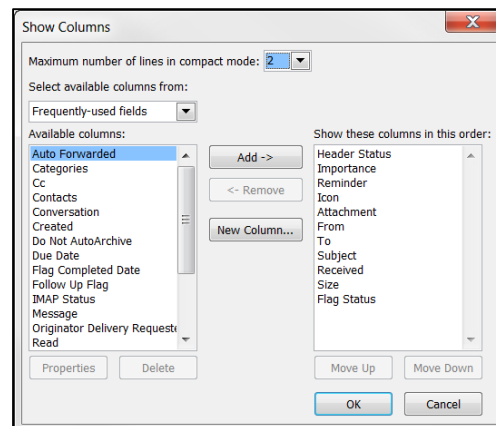


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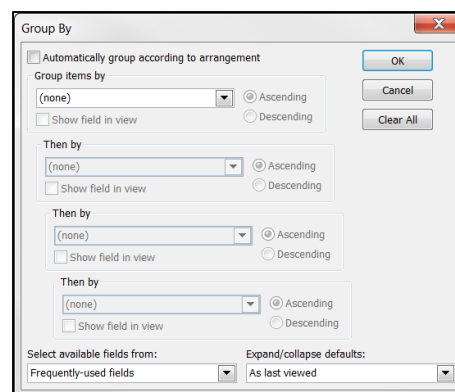
### Modifying which Columns Display

1. From the *Advanced View Settings* dialog box, click **Columns**. The *Show Columns* dialog box (shown right) will display with the most frequently-used fields available.
2. In the **Select available columns from** field, click the **field drop-down arrow** and select the applicable category of fields to choose from.
3. In the **Available columns** list, click to select the column and click **Add**. The new field will display in the **Show these columns in this order** list.
  - a. Click **Move Up** or **Move Down** to change the order.
  - b. To delete a column, click to select it in the **Show these columns in this order** list and click **Remove**.
4. When finished editing, click **OK**. Your screen will return to the *Advanced View Settings* dialog box.



### Modifying the Group By Options

1. From the *Advanced View Settings* dialog box, click **Group By**. The *Group By* dialog box will display (shown right).
2. For Outlook behavior to automatically group according to the selected arrangement, click to select the checkbox **Automatically group according to arrangement**.
3. In the **Group items by** field, click the **drop-down arrow** and select the primary group by field. Click to select either **Ascending** or **Descending** order.



*If grouping by multiple items, follow the same instructions for the additional three "group by" levels in the **Then by** drop-down field lists.*

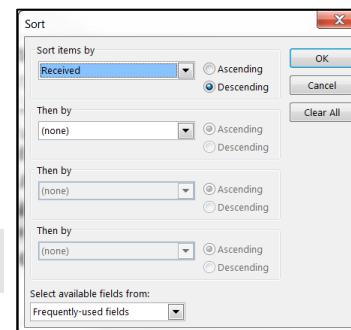
- Click **Clear All** to remove the **Group By** setting.
  - Click the **drop-down arrow** to display the options for **Expand/collapse default**. Select **All expanded**, **All collapsed** or **As last viewed**.
4. When finished, click **OK**. Your screen will return to the *Advanced View Settings* dialog box.

### Modifying the Sort Options

1. From the *Advanced View Settings* dialog box, click **Sort**. The *Sort* dialog box will display (shown right).
2. In the **Sort items by** and **Then by** fields, click the **drop-down arrow** and select the appropriate sort fields.
3. Click to select either **Ascending** or **Descending** order.

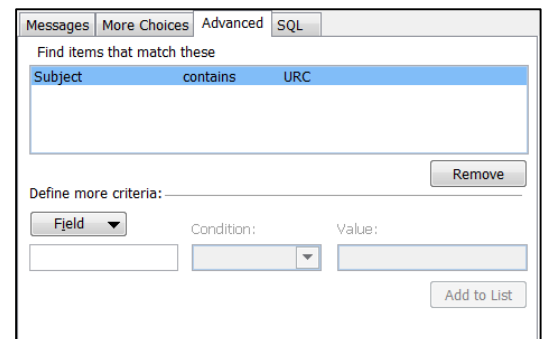
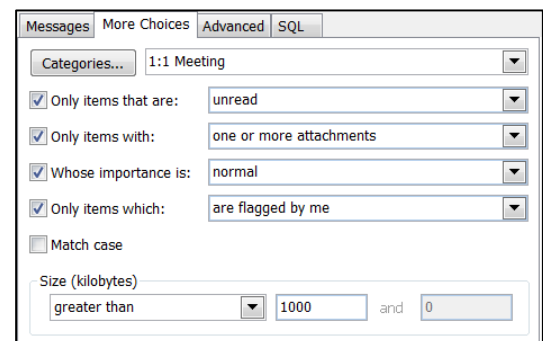
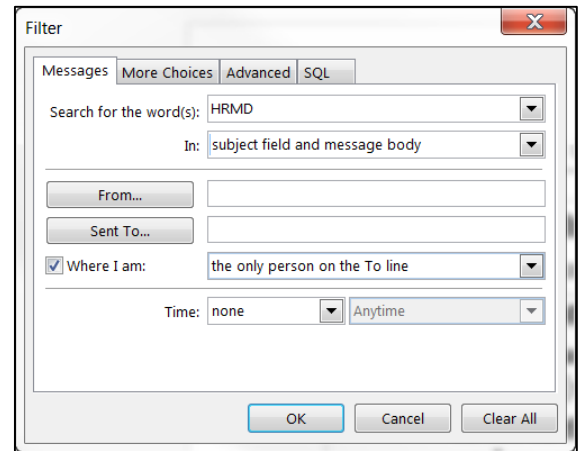
*By default, the **Select available fields** from drop-down list is set to **Frequently-used fields**. Click the drop-down arrow to select a different field set.*

4. When finished, click **OK**. Your screen will return to the *Advanced View Settings* dialog box.



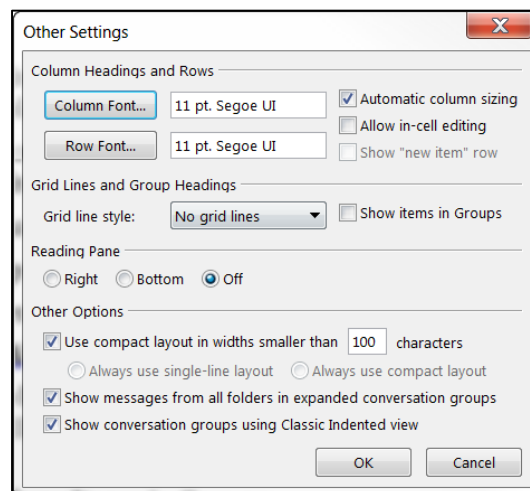
### Modifying the Filter Options

- From the *Advanced View Settings* dialog box, click **Filter**. The *Filter* dialog box will display.
- On the **Messages Tab** (shown right), enter your search criteria:
  - In the **Search for the word(s)** field, type the search keyword(s).
  - In the **In** field, select **subject field only** or **subject field and message body**.
  - Click **From...** to select the sender from either the Outlook address book or your personal contacts. You can select multiple people.
  - Click **Sent To** and select the recipient from either the Outlook address book or your personal contacts. You can select multiple people.
  - Click the **Where I am** checkbox to enable the field, and click the **drop-down arrow** to select **the only person on the To line, on the To line with other people, or on the CC line with other people**.
  - Click the **Time** drop-down arrow to select from the list provided. Options include the **time received, sent, due, expires, created** or **modified**.
  - Once a time criteria has been designated, click the **drop-down arrow** in the next field to select from the list provided. Options include **Anytime, Yesterday, Today, in the last 7 days, Last/This week, or Last/This Month**.
- On the **More Choices Tab** (shown right), click **Categories** to select a category to search by.
- Click the **checkbox** to enable one (or more) of the following conditions as appropriate:
  - Only items that are** either **read** or **unread**.
  - Only items with** either **one or more attachment**, or **no attachments**.
  - Whose importance is **normal, high** or **low**.
  - Only items which** are **marked completed, are flagged by someone else, have no flag** or **are flagged by me**.
  - In the **Size** section, select from the options provided and then enter **the size limitations** in the **two size fields**.
- On the **Advanced Tab** (shown right), create a conditional search using multiple search criteria as follows:
  - Click the **Field drop-down arrow** and select the field **type** and **specific field** to search within.
  - In the **Condition** field, select the conditional search **operator**. Options vary depending on the field type being searched. Text field types include the options **contains, is (exactly), doesn't contain, is empty, and is not empty**.
  - In the **Value** field, enter the **text** to be searched.
  - Click **Add to List** to add the search criteria into the **Find items that match these** list box.
  - Follow the steps above to continue creating search criteria as appropriate.
  - Click **Remove** to delete search criteria.
- When finished defining the filter, click **OK**. Your screen will return to the *Advanced View Settings* dialog box.



### Modifying Other Settings

- From the *Advanced View Settings* dialog box, click **Other Settings**. The *Other Settings* dialog box displays (shown right).
- Use the options in the **Column Headings and Rows** section to modify how the columns and rows display:
  - Click **Column Font** to change the font attributes for the columns.
  - Click **Row Font** to change the font attributes for the rows.
  - Select the **checkbox** to enable **Automatic column sizing**.
  - Select the **checkbox** to **Allow in-cell editing**.
- In the **Grid Lines and Group Headings** section, click the **drop-down arrow** to select from **No grid lines**, **Small dots**, **Large dots**, **Dashes** and **Solid**.
- Click to select the checkbox **Show Items in Groups**.
- Use the **Reading Pane** options to adjust the *Reading Pane* behavior.
  - Click to select to display the *Reading Pane* **Right**, **Bottom** or **Off**.
  - Click to select the **checkbox** for **Hide header information** to display the content but not the heading of the message when viewed in the *Reading Pane*.
- In the **Other Options** section change how conversation groups display.
  - Click **Show messages from all folders in expanded conversation groups** to display sent, received and moved messages in the Conversation Groups.
  - Click **Show conversation groups using Classic Indented view** to display conversations with the subordinate messages indented below the original message.

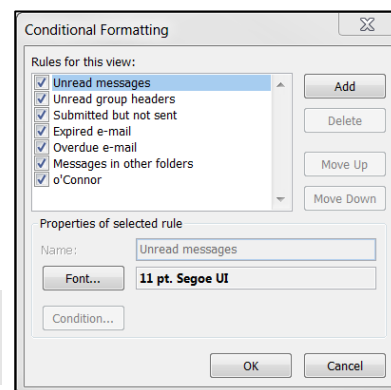


### Create Conditional Formatting For a View

Use conditional formatting to highlight specific messages from specific e-mail addresses so they display in a unique way in the selected view. There are many combinations of formatting conditions that can be applied. The following instructions are just one example. In this case, we will apply a specific color to e-mails from an e-mail address.

- From the *Advanced View Settings* dialog box, click **Conditional Formatting**. The *Conditional Formatting* dialog box will display (shown right).
- Click **Add**. A new “untitled” rule will display in the **Rules for this view** list.
- Enter a title for the new rule in the **Name** field.
- Click **Font**. The *Font* dialog box will display. Select the font color and attributes desired and click **OK**. Your screen will return to the *Conditional Formatting* dialog box.
- Click **Condition**. The *Filter* dialog box will display. For instructions on building filter conditions, see the section entitled *Modifying the Filter Options* at page 3.

*For this example, click **From** and select the appropriate e-mail address from the *Global Address Book*, your *personal address book* or your *personal contacts list*. Click **OK**. Your screen will return to the *Conditional Formatting* dialog box.*



- Ensure the new rule has a checkmark beside it in the **Rules for this view** list.
  - Deselect any rules that do not apply to this view by clicking the **checkbox**.
  - Move Up** or **Move down** the rule by clicking the appropriate button.
- Click **OK** three times to dismiss all dialog boxes.